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MUSIC USA 90

The American Music Conference's 1990
Statistical Review of the U.S. Music Industry
with Highlights of AMC's Teenagers' Attitudes Toward
Music-Making and Music Education Survey

THE AMERICAN MUSIC CONFERENCE

What is AMC?

The American Music Conference, a national nonprofit educational association, was founded in 1947 to encourage active amateur music-making and music education for people of all ages. Members include major musical instrument manufacturers, retailers, wholesalers, music industry and music education associations, educational institutions, individuals, and others.

AMC's ten-fold mission is to:

- Educate the general public about the benefits of music in education, recreation and cultural activities.
- Encourage the support, continuation and improvement of the standards of music education in schools.
- Increase appreciation of the value of music in the home, as an avocation and as a character-building activity for youngsters.
- Encourage adult instrumental and choral participation.
- Further interest in and attendance at professional entertainment and cultural performances.
- Promote the use of music in industry and therapy.
- Advise and counsel governmental agencies that may engage in the support of community and other musical activities.
- Give recognition to personal effort, distinguished service and leadership in developing musical activities.
- Acquire and disseminate information, undertake studies and surveys, produce publications and publicity, sponsor competitions.
- Cooperate with and support other organizations in the development and advancement of music and musical activities.

What Does AMC Do?

As the public relations and research arm of the entire U.S. music industry, AMC's ongoing programs in support of its mission include:

Consumer Publicity

Publicizing the benefits of music-making and music education with a variety of messages that reach millions of Americans each year through stories carried by national wire services and newspapers, television and radio broadcasts, cable television programs, consumer magazines, industry and music educator trade publications and other print media.

Statistical Reporting

Collecting and disseminating statistical information through MUSIC USA, the music industry's only ongoing annual review of domestic and foreign manufacturers' shipments (at retail value) of traditional and electronic instruments, printed music and accessories.

Consumer Research

Conducting national consumer research into American's attitudes toward music-making and music education and trends in musical instrument usage.

Music Family Award

Encouraging and recognizing family togetherness and music-making in the home and community with the annual AMC "Amateur Music Family of the Year" award.

Information Source

Serving as the source which governmental agencies, educators, news media, financial analysts, advertising agencies and the public rely on for information about music-making and the music industry.

Who Does AMC Represent?

AMC represents all members of the music industry and music educator communities in the U.S.; it does not promote individual companies, products or people within the industry.

Who Supports AMC?

AMC is supported by the contributions of its members which include instrument and accessory manufacturers, retailers, wholesalers, distributors, publishers, suppliers, trade magazines, and other industry and music educator associations. Contributions are also accepted from music educators, musicians and other individuals who wish to help support the association's programs.

AMC Member Services

In addition to helping AMC spread positive, encouraging messages about music-making and education to America's general public, your contribution entitles you to:

- Six newsletters a year informing you about AMC's publicity results, award programs, research activities and other special projects.
- MUSIC USA, our annual statistical review which reports on manufacturer shipments at retail value in 14 different categories of instruments, printed music and accessories.
- Full written reports on new AMC-sponsored consumer attitude and usage research surveys available at special member rates.

How to Become an AMC Member

For a very small investment in AMC, you will be helping support a wide range of activities which will return that investment many times over.

For more information about AMC membership and recommended contributions, please contact Paul Bjorneberg, Director of Administrative Services, American Music Conference, 303 E. Wacker Drive, Suite 1214, Chicago, IL 60601, or call (312) 856-8820.

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FROM THE PRESIDENT

"Musical training is a more potent instrument than any other, because rhythm and harmony find their way into the inward places of the soul."

Plato

For more than forty years, the American Music Conference's mission has been to encourage active amateur music-making by people of all ages and promote the support of individual music teachers and school music programs.

This mission is accomplished through two major areas of focus; Research projects, such as the Teenagers' Attitude Survey reported in this edition of *Music USA*, and our ongoing publicity programs which underline the importance of music-making experiences for children, adults, senior citizens and families.

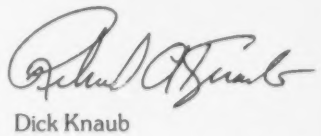
Each year, AMC devotes a large percentage of its time and efforts to activities that reach Americans with positive messages about instrumental music-making and its many benefits.

Our activities in this area take a variety of forms including:

- Publicizing the benefits of music-making and education with a variety of messages that reach millions of Americans each year through stories carried by national wire services and newspapers, television and radio broadcasts, cable television programs, consumer magazines, industry and music educator trade publications and other print media.
- Developing informational consumer brochures, such as our very successful *Music and Your Child: The Importance of Music To Children's Development* brochure (of which we've distributed nearly 300,000 around the U.S. and the world) and our newest publication, *Yes You Can! Learn to Play a Musical Instrument as an Adult.* This brochure was developed to reach a new and growing audience—adults—with information about why they should stay with or return to music study and participation.
- And sponsoring the annual Amateur Music Family of the Year award program, through which we encourage and recognize family togetherness and music-making in the home and community.

I believe we all agree that music-making is essential to personal well being and the development of our society. And for that reason, AMC continues to provide positive support to every member of the music community.

On behalf of the American Music Conference, I would like to thank everyone who supports our efforts and makes possible our continuing efforts to spread the good word about music, particularly the National Association of Music Merchants for its support of this publication and the many, many other music community members who give of their time, talents and effort.



Dick Knaub

HOW TO READ THE DATA

All units and dollars in this annual review are based on shipments by manufacturers at estimated retail value. Imports, and in some cases exports, are included where noted.

To provide an indicator of actual sales at the music retailer level, this review also includes the results of the National Association of Music Merchants' (NAMM) ongoing survey of music stores around the country.

The total 1989 sales figure of $3.6 billion represents in large part manufacturers' shipments sold through music stores. However, in the past several years, the numbers of different outlets selling musical instruments have increased, particularly with the popularity of electronics. Therefore, in categories where it is appropriate, dollar figures also include estimated sales through mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers by manufacturers, publishers or distributors.

It should be noted that retail dollar estimates in this report are based on shipments to retailers which may or may not have been sold to consumers each year. The sources of these figures vary widely depending on the availability of a reporting mechanism, the nature of the mix of U.S. made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S. Customs Department.

Only one category in this review is based on an organized but voluntary reporting system, and even within this category (pianos) estimates have been made for manufacturers who do not report their shipments. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, continues to be a particular challenge.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry using as a baseline a 1987 survey by the National Music Publishers Association.

Wind instruments, percussion and string data have been analyzed by industry experts who have tracked both domestic manufacture and imports.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed string instruments. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

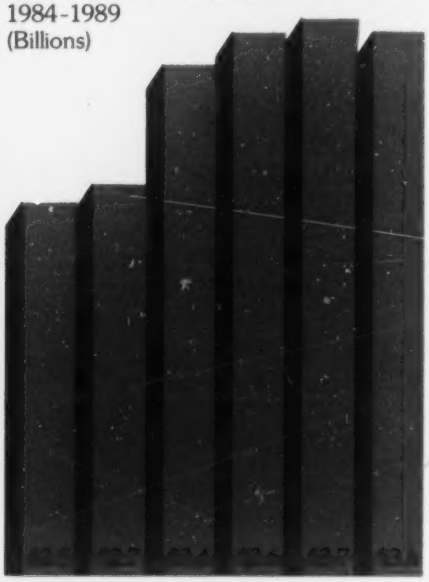
Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1983, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents several months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

1989 RETAIL VALUE OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND MUSICAL ACCESSORIES DOWN 3 PERCENT TO $3.6 BILLION

MUSIC INDUSTRY RETAIL DOLLARS
1984-1989
(Billions)



	Music Industry Retail Value	Personal Consumption	% of Personal Consumption[3]	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1989	$3,602,446,000	$3,471.1	0.104%	$5,234.0	371.3
1988	3,716,140,000	3,227.5	0.115%	4,864.3	354.3
1987	3,677,747,000	3.012.1	0.122%	4.526.7	340.4
1986	3,344,957,000[5]	2,762.5	0.121%	4,206.1	328.4
1985	2,697,900,000	2,582.1	0.104%	3,989.1	322.2
1984	2,496,333,000	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	423.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1959	490,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	438,000,000	281.4	0.156%	441.1	84.3
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1941	90,000,000	80.6	0.111%	124.5	44.1

1. For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music sales. Includes a new category – synthesizers.
2. Includes a new category – electric pianos.
3. To be read as a fraction of 1%.
4. Includes a new category – portable keyboards – plus revised estimates for several categories.
5. Figure adjusted to reflect final printed music data from survey results not available at 1986 press time.

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

STATISTICAL INFORMATION

Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Acoustic piano units were down 17% in 1989; total dollars decreased 10%. Grand pianos, which account for some 53% of this category's total dollars, were off 9% in dollars and 18% in units. Imported verticals decreased 36% in units and 20% in dollars. All verticals, combined, dropped 17% in units and 11% in total dollars.

Pianos

	Units	Dollars[1]
1989	138,745	$623,351
1988	162,861	683,616
1987	174,993	682,725
1986	166,555	619,783
1985	151,300	480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1974	248,405	273,246
1973	247,701	239,179
1972	232,507	208,924
1970	193,814	164,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

[1] *In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.

Organs

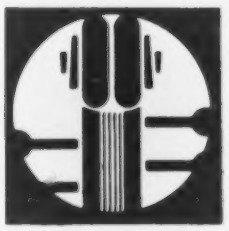
Includes: Domestic production and imports with retail value of $1,000 and up. Exports are not included.

During 1989, units and dollars both dropped 33%. Industry sources reported steady sales of higher-priced instruments.

Organs

	Units	Dollars[1]
1989	17,000	$63,410
1988	25,500	95,162
1987	35,200	121,608
1986	40,000	140,000
1985	49,600	156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1974	233,845	424,896
1973	202,275	358,836
1972	186,000	314,340
1970	137,500	215,400
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1] *In thousands of dollars.*
Source: International Association of Electronic Keyboard Manufacturers, U.S. Tariff Commission and industry estimates.



String Instruments

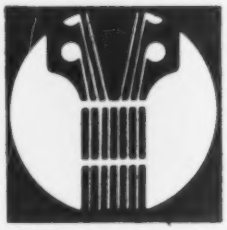
Includes: Imports and domestic production of violins, violas, cellos and basses.

Units in this category were down 1% while dollars rose 2%. The trend toward imports from Asia continued during 1989; units shipped from Japan, Korea, Mainland China, Hong Kong and Taiwan accounted for some 46% of the category's units and 25% of the dollars.

String Instruments

	Units	Dollars[1]
1989	113,300	$43,116
1988	114,600	42,097
1987	102,740	40,144
1986	86,950	32,029
1985	70,000	26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1974	63,655	19,466
1973	54,866	15,252
1972	61,585	12,559
1970	75,700	19,720
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1] *In thousands of dollars.*
Source: U.S. Tariff Commission with adjustment made for domestic production.



Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

Total units for fretted instruments were stable in 1989 and dollars were down 9%. Domestic production was down 4% in units and up 10% in dollars. Industry sources reported a solid demand for acoustic guitars, particularly in the high-end for trade-up buyers. Imported acoustic and electric guitars, combined, were down some 11% in units and off 18% in dollars.

Fretted Instruments

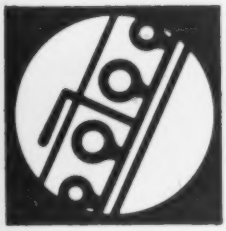
	Units	Dollars[1]
1989	1,415,500	$379,751
1988	1,422,355	412,325
1987	1,247,265	328,322
1986	1,121,235	302,033
1985	1,056,152	271,636
1984	994,607	236,000
1983	875,106	214,500
1982	1,213,138	252,805
1981[2]	1,332,550	320,417
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1970[2]	2,214,686	159,910
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1] *In thousands of dollars.*
Source: U.S. Tariff Commission and industry estimates.
[2] *These years also include estimates of amplifier and P.A. system sales.*

Fretted Instruments

	1989		1988		1987	
Domestic	**Units**	**Dollars**	**Units**	**Dollars**	**Units**	**Dollars**
Includes Non-electric guitars, Electric guitars and other fretted inst.[1]						
Domestic Total ($ rounded)	135,000	$129,511,000	141,000	$ 118,213,000	123,400	$ 89,279,000
Imports						
Non-electric guitars	556,000	$110,016,000	652,419	$ 107,500,000	517,331	$ 79,570,000
Electric guitars	468,284	128,100,000	485,135	174,460,000	452,852	150,642,000
Other fretted:	256,148	12,124,000	143,801	12,152,000	153,682	8,831,092
Import Total ($ rounded)	1,280,500	$250,240,000	1,281,355	$ 294,112,000	1,123,865	$239,043,100
Grand Total ($ rounded)	1,415,500	$379,751,000	1,422,355	$ 412,325,000	1,247,265	$328,322,100

[1] *Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.*
[2] *Includes banjos, ukuleles and mandolins.*

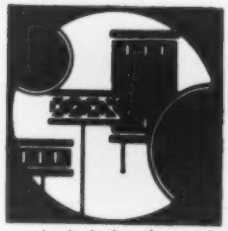


Woodwind Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.

Brass Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.



Percussion

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

Both woodwind and brasswind units were stable compared to 1988, and both segments of this category grew 6% in dollars.

Industry sources reported strong consumer demand for trombones. School music programs, in general, were reported to be stable as were numbers of students participating in school band programs.

Band Instruments
A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars[1]
1989	354,800	$190,360
1988	354,800	179,587
1987	346,996	171,035
1986	326,500	158,000
1985	309,800	141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	353,000	85,073
1972	329,207	76,972
1970	304,000	66,150
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

[1]*In thousands of dollars. Source: Industry estimates.*

Band Instruments
B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

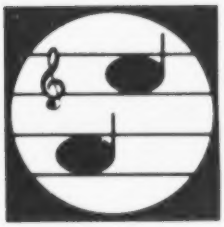
	Units	Dollars[1]
1989	152,335	$82,820
1988	152,335	78,132
1987	146,475	74,411
1986	139,500	69,150
1985	144,600	67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1974	267,380	71,118
1973	254,000	63,754
1972	219,800	53,666
1970	225,000	51,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

The percussion market remained steady in 1989. While overall units were estimated to be down, industry sources cited price increases as contributing to the category remaining stable. Imports, which represent the majority of this category were down due in part to the weakness of the U.S. dollar against foreign currencies.

Drums

	Units	Dollars[1]
1989	NA	$105,525
1988	NA	105,525
1987	NA	100,500
1986	NA	90,000
1985	NA	83,000
1984	NA	82,000
1983	NA	78,000
1982	NA	78,475
1981	NA	82,914
1980	NA	69,017
1979	NA	70,426
1978	NA	61,240
1977	NA	56,700
1976	NA	53,000
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,856
1970	NA	32,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: Industry estimates.
Unit figures unavailable since drums sold in sets.



Printed Music

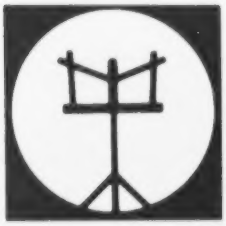
Includes: Domestic publishing of sheet music and self-instruction aids.

Solid markets for church and school choral music and rock 'n roll and heavy metal printed music books contributed to this category's 3% increase over 1988. Industry sources also noted stable school band programs and a steady market for self-instructional music as contributing to the increase.

Printed Music

	Dollars[1]
1989	$340,417
1988	330,502
1987	308,880
1986	286,000
1985	275,000
1984	266,800
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1970	91,500
1967	72,000

[1]In thousands of dollars. 1961–1983 data from a new survey sponsored by National Music Publishers' Assoc., Church Music Publishers' Assoc., and Music Publishers' Assoc. of the U.S.
Source: Industry estimates.



Accessories

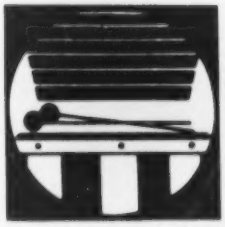
Includes: Estimates for sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Increases in all segments of this category contributed to an overall 6% rise in 1989. Guitar strings, the largest dollar volume segment, were up 5%. Guitar and electronic accessories and stands showed the largest gains, up 10% each.

Accessories

	Dollars[1]
1989	$260,000
1988	244,400
1987	230,700
1986	226,000
1985	208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1974	183,474
1973	152,895
1972	132,953
1970	108,400
1967	85,000

[1]In thousands of dollars.
Source: Industry estimates
[2]Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.



Miscellaneous Other Instruments

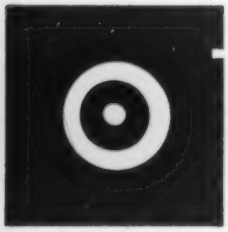
Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Total dollars for this category (including 19 different types of imported instruments) were down 3% in 1989. Contributing to the decline were substantial decreases in electronic instruments. Percussion instruments (drums, cymbals and other percussion instruments) were up 15% and electronic instruments dropped 175%. Combined, percussion and electronics accounted for 56% of this category, compared to 71% in 1988.

Miscellaneous Other Instruments

	Dollars[1]
1989	$334,150
1988	345,274
1987	301,214
1986	226,954
1985	211,161
1984	166,000
1983	151,000
1982	80,000
1981	133,666
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,887
1974	106,628
1973	107,072
1972	92,146
1970	78,509
1967	53,800

[1]In thousands of dollars.
Source: U.S. Tariff Commission.
[2]Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.



Music Software

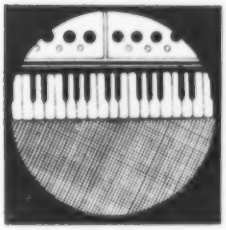
Includes: Domestic production of sequencing, music notation or sound editing and librarian software products that allow for the creation or composition of music for the purpose of performance, recording, or publishing.

According to industry sources, factors contributing this category's 10% increase in 1989, included educational institutions' use of software to teach theory and composition; an increase in adults using home computers to create music and upgrading by current users.

Music Software

	Dollars[1]
1989	$27,500
1988	25,000
1987	20,000

[1]*In thousands of dollars.*
Source: Industry estimates.



Portable Keyboards

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

Total units and dollars for this category were down 38% and 27%, respectively; units retailing for under $300 decreased 42% while those at $300 and over per-unit rose 14%.

Sources cited trade-ups to higher-end units by purchasers seriously interested in music-making for themselves and their families as contributing to the rise in $300 and over units. A maturing market and competition from other electronic products, such as home video games, were reported as contributors to the decline in lower-end units.

	Units	Value
Under $300:	2,807,000	$210,202,000
Over $300:	285,000	$105,735,000
Total:	3,092,400	$315,937,000

Portable Keyboards

	Units	Dollars[1]
1989	3,092,000	$315,937
1988	4,255,400	401,158
1987	4,798,000	548,750
1986	2,500,000	526,500
1985	1,300,500	253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53,900[2]
1980	NA	7,586[3]

[1]*In thousands of dollars.*
[2]*Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.*
[3]*Included in Miscellaneous Other Instruments in 1980.*

Synthesizers

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers.

According to sources, a maturing of the market contributed to a 12% decrease in units during 1989; dollars rose 6%. The market for entry-level buyers was reported to have been steady. Drum synthesizers accounted for nearly one-third of all units in this category.

Synthesizers

	Units	Dollars[1]
1989	322,000	$322,188
1988	361,800	303,040
1987	378,500	299,900
1986	350,500	275,000
1985	220,000	173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates*

Electric Pianos/ Electronic Keyboards

Includes: Domestic production, imports and exports.

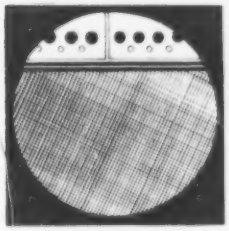
Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

Size, range of features and MIDI-capability were some of the factors that continued to attract consumers in 1989, according to industry sources, and contributed to a 6% and 13% increase in units and dollars, respectively. Other factors included a growing church and school music program market.

Electric Pianos/ Electronic Keyboards

	Units	Dollars[1]
1989	114,750	$206,551
1988	108,255	181,868
1987	103,100	173,208
1986	84,000	134,400
1985	60,000	107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates.*



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

During 1989, guitar amplifiers rose 10% in units and 8% in dollars. Industry sources cited strong high-end trade up and steady low-end, first-time buyer markets as contributing to the increase.

P.A. systems and components increased 6% in dollars compared to 1988. Speaker systems (the largest dollar volume segment) were up nearly 10%. Speaker systems and signal processors (the two largest dollar segments) combined accounted for 38% of the category's dollars.

Amplifiers

	Units	Dollars[1]
1989	233,600	$66,370
1988	212,350	61,454
1987	200,300	58,250
1986	188,700	55,228
1985	170,000	51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245
1971[2]	96,000	35,643

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

P.A. Systems and Components

(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Units	Dollars[1]
1989	NA	$241,000
1988	NA	227,000
1987	NA	215,100
1986	NA	203,900
1985	NA	192,000
1984	NA	181,000
1983	NA	171,000
1982	NA	157,500
1981	NA	175,000[3]
1980	NA	121,000[4]
1979	NA	121,000
1978	NA	106,000
1977	NA	100,000
1976	NA	60,000
1975	71,000	53,000
1974	60,000	45,000
1973	18,900	11,246
1972	18,000	10,318
1971[2]	16,000	9,903

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*
[3]*Includes $18 million of electronic devices previously included in the "Accessories" category.*
[4]*Low estimate according to industry sources.*

MUSICAL INSTRUMENT EXPORTS UP 8% IN 1989 TO ALL-TIME HIGH; IMPORTS DOWN 32%

The continued weakness of the U.S. dollar against foreign currencies contributed to an estimated 8% increase in U.S. exports of musical instruments, parts and accessories during 1989, bringing total value to nearly $224.41 million, according to AMC's annual interpretive analysis of U.S. Department of Commerce data. The 1989 figure represents an all-time high for exports and is the fourth consecutive year of increase.

Imports of musical goods to the U.S. market were down 32% in 1989, with total value reported at $632.77 million.

1989 U.S. EXPORTS OF MUSICAL INSTRUMENTS AND PARTS

KEY: *Updated U.S. Department of Commerce Figures for Prior Years. (Changes represent carry-over figures or year-end figures not previously reported by past Music USA tables.)

**Figures readjusted by AMC to more accurately reflect exports.

Harmonized System Numbers for each category appear below each category listing.

CATEGORY	1989 Units	1989 Value	1988 Units	1988 Value	1987 Units	1987 Value	1989 Leading Sources
Pianos[1] (HS 9201.100000 & 9201.200000)	8,415**	$8,027,000**	6,288**	$8,448,000**	4,994**	$6,220,000**	Canada/Japan
Pipe & Reed Organs (HS 9203.000000)	3,848	$2,176,000	140	$448,000	124	$480,000	Canada
Acoustic Guitars (HS 9202.903000)	76,422	$11,124,000	29,644	$8,065,000	14,571	$4,417,000	Japan/ United Kingdom
Electric Guitars (HS 9207.900040)	63,985	$14,990,000	33,496	$10,312,000	26,145	$8,686,000	Japan/ United Kingdom
Other Plucked & Bowed Strings[2] (HS 9202.100000 & 9202.906000)	95,990	$14,528,000	29,287*	$4,180,000*	39,405*	$3,834,000*	Japan/ United Kingdom
Brasswinds (HS 9205.100000)	57,426	$14,917,000	64,319	$19,745,000	45,022	$13,549,000	Japan/Canada
Woodwinds (HS 9205.901000)	83,811	$17,119,000	52,104	$8,295,000	42,075	$5,709,000	Japan/West Germany
Percussion (HS 9206.000000)	N/A	$14,758,000	N/A	$12,086,000	N/A	$17,387,000	Japan
Synthesizers, Electric Pianos (HS 9207.100020)	62,565	$11,310,000	20,387*	$12,188,000*	12,037*	$6,627,000*	Japan/West Germany
Other Electronic Instrs.[3] (HS 9207.100080 & 9207.900080)	N/A	$45,414,000	N/A	$63,360,000*	N/A	$49,187,000*	United Kingdom/ Japan
NEW CATEGORIES IN 1989							
Harpsichords, Clavichords (HS 9201.900000)	8,432	$2,700,000	2,240	$1,159,000	2,638	$901,000	Taiwan/Canada
Other Instruments[4] (HS 9204.100000, 9204.200000 & 9205.906000)	N/A	$3,925,000	N/A	$1,588,000*	N/A	$744,000*	Mexico/ United Kingdom
Fretted & Bowed String Instrs. Parts, Accessories[5] (HS 9209.300000 & 9209.920000)	N/A	$23,271,000	N/A	$11,540,000	N/A	$8,206,000	Japan/West Germany
Piano Parts, Accessories[6] (HS 9209.910000)	N/A	$7,203,000	N/A	$5,175,000	N/A	$4,099,000	Mexico
Pipe & Reed Organ Parts, Accessories[7] (HS 9209.930000)	N/A	$2,733,000	N/A	$6,006,000	N/A	$4,762,000	Mexico/Japan
Electronic Instrs. Parts, Accessories[8] (HS 9209.940000)	N/A	$11,137,000	N/A	$6,281,000	N/A	$4,978,000	Japan
Other Instrs. Parts, Accessories[9] (HS 9209.990000)	N/A	$17,400,000	N/A	$23,078,000	N/A	$16,414,000	West Germany/Japan
Other Accessories[10] (HS 9209.100000)	N/A	$1,675,000	N/A	$5,770,000	N/A	$4,103,000	Japan
TOTALS	N/A	$224,407,000	N/A	$207,726,000	N/A	$160,303,000	

[1]Includes: Uprights, Grands, Players. NOTE: Figures have been adjusted by AMC to more accurately reflect exports. Categories may still contain misclassified instruments. [2]Includes: Violins, Violas, Cellos, Basses, Banjos, Mandolins, Ukuleles, Dulcimers, Harps. [3]Includes: Other Electronic Keyboards, Electronic Drums, Electronic Wind Instruments, etc. NOTE: Figures for 1988 & '87 may contain misclassified instruments. [4]Includes: Accordions, Mouth Organs, Recorders, Bagpipes, Ocarinas, etc. NOTE: 1989 figure as reported by U.S. Department of Commerce may contain misclassified or "toy" wind instruments. [5]Includes: Fretted & Bowed String Instrument Parts and Accessories, i.e., strings, bridges, bows, tuning pins, etc. [6]Includes: Piano Parts & Accessories, i.e., actions, tuning pins, strings, cut case parts, etc. [7]Includes: Pipe and Reed Organ Parts & Accessories, i.e., pipes, reeds, keyboards, etc. [8]Includes: Electronic Instrument (Keyboard, Guitar, Drums, etc.) Parts & Accessories, i.e., body and case parts, frets, keyboards, etc. [9]Includes: Brasswind, Woodwind, Percussion Instrument Parts & Accessories. NOTE: Also includes parts & accessories for other "musical instruments", i.e., calliopes, decoy calls, etc. [10]Includes: Metronomes, Tuning Forks, Pitch Pipes.

It should be noted that 1989 was the first year the U.S. Department of Commerce reported import and export data under "The Harmonized System." The change-over from the previous reporting system brought America's data collection and reporting into line with our major trading partners and the rest of the world and makes possible the comparison of like products and systems. Because of this change, several new breakouts (mostly relating to various instrument parts and accessories) are included in this year's report. Figures reported for 1988 and 1987 for these new categories are government estimates provided for comparison purposes.

1989 Exports

Exported acoustic guitar units jumped 158% and 38% in value. Japan became the leading customer, receiving 26,242 units (up 400% from 1988) valued at $4.3 million.

Acoustic piano exports were up 34% to 8,400 units and down 5% in total value to approximately $8 million.

1989 U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

KEY: *Updated U.S. Department of Commerce Figures for Prior Years; changes represent carry-over or year-end figures not previously reported.
**Figures readjusted by AMC to more accurately reflect imports.

Harmonized System Numbers for each category appear below each category listing.

CATEGORY	1989 Units	1989 Value	1988 Units	1988 Value	1987 Units	1987 Value	1989 Leading Sources
Pianos[1] (HS 9201.100000 & 9201.200000)	56,339**	$114,950,000**	77,384**	$150,785,000**	80,251**	$141,197,770**	Japan/S. Korea
Harpsichords, Clavichords (HS 9201.900000)	3,800	$5,621,000	4,972	$5,171,000	7,302	$7,576,000	S. Korea
Pipe Organs (HS 9203.004000)	352	$7,213,000	156	$9,582,000	104	$8,100,000	Canada
Organs (Not Pipe & Electric)[2] (HS 9203.008000)	2,793**	$881,000**	9,362**	$1,265,000**	8,164	$2,189,000**	Italy
Violins, Violas, Cellos, Basses (HS 9202.100000)	143,519	$8,184,000	117,430	$7,966,000	109,632*	$7,688,000**	West Germany
Acoustic Guitars (HS 9202.902000 & 9202.904000)	556,000	$27,504,000	681,967*	$27,328,000*	554,250*	$20,342,000*	S. Korea
Electric Guitars (HS 9207.900040)	468,284	$32,025,000	485,135	$43,615,000	452,852	$37,660,000	S. Korea/Japan
Other Stringed Instrs.[3] (HS 9202.906000)	256,148	$3,031,000	143,801	$3,038,000	153,682	$2,208,000	S. Korea
Brasswind Instrs.[4] (HS 9205.100060)	36,226	$12,482,000	32,321	$10,784,000	32,028	$9,077,000	Japan
Clarinets (HS 9205.904020)	29,959	$4,384,000	19,928	$4,006,000	24,585	$5,902,000	France
Saxophones (HS 9205.904040)	51,071	$12,057,000	32,145	$12,615,000	27,999	$9,106,000	Japan/Taiwan
Other Wind Instrs.[5] (HS 9205.904060, 9205.904080 & 9205.90600)	1,619,638	$6,859,000	1,283,721	$7,338,000	976,586	$7,049,000	Japan
Percussion Instrs.[6] (HS 9206.002000, 9206.004000 & 9206.006000)	N/A	$35,504,000	N/A	$31,125,000*	N/A	$29,115,000*	Taiwan
Electronic Keyboards (One+ Keyboards)[7]							
Under $200:	22,047	$ 511,000	990,923	$ 31,526,000	123,521*	$ 7,639,000*	
$200 & Over:	17,071	$15,388,000	11,787	$12,680,000	11,492*	$10,231,000*	
(HS 9207.100045 & 9207.100055)	39,118	$15,899,000	1,002,710	$44,206,000	135,013	$17,870,000*	Japan/S. Korea
Electronic Keyboards (1 Keyboard) & Other[8]							
Under $100:	2,380,689	$ 76,310,000	4,464,819	$189,574,000	3,706,933	$162,836,000	
$100 & Over:	444,093	$101,161,000	405,566	$87,491,000	283,782	$78,913,000	
(HS 9207.100065 & 9207.100075)	2,824,782	$177,471,000	4,870,385	$277,065,000	3,990,715	$241,749,000	Japan
Synthesizers (Keyboard Type)[9]							
Under $100:	120,638	$ 1,424,000	87,532	$ 2,562,000	407,224	$13,870,000	
$100 & Over:	68,132	$35,762,000	76,253	$39,915,000	104,211	$49,175,000	
(HS 9207.100005 & 9207.100010)	188,770	$37,186,000	163,785	$42,477,000	511,435	$63,045,000	Japan
Hand-Held Electronic Instrs.[10] (HS 9207.100080)	219,395	$2,686,000	416,853	$6,858,000	292,957	$5,268,000	Japan
Other Electronic Instrs.[11] (HS 9207.900080)	406,189	$14,211,000	502,114	$33,844,000	792,589	$57,630,000	Japan
Accordions, Concertinas (HS 9204.104000 & 9204.106000)	10,485**	$1,481,000**	8,121	$1,497,000	3,709	$1,070,000	Italy
Mouth Organs[12] (HS 9204.200000)	202,488	$4,054,000	175,881	$5,064,000	251,107	$3,462,000	West Germany
Instrument Strings[13] (HS 9209.300000)	N/A	$3,483,000	N/A	$3,885,000	N/A	$4,123,000	Austria/ United Kingdom

Canada imported the largest number of units: 3,427 valued at more than $3.2 million.

Exported woodwind instruments increased 61% (to nearly 84,000 units) and 106% in value to $17 million. Shipments to Japan, West Germany and Canada accounted for 42% of the value and 34% of units. Brasswinds were down 12% in units (to 57,400) and off 32% in total value to $15 million. Total value of exported percussion instruments increased 22% to $14.8 million, with Japan the leading customer. The Other Plucked and Bowed Strings category rose 228% to 96,000 units valued at $14.5 million (up 248%).

Combined, all exported electronic instruments dropped 20% to $71.7 million and accounted for 32% of all U.S. musical instrument exports.

Electric guitars increased 91% to 64,000 units valued at $15 million (up 45%). Japan and the United Kingdom were the leading customers.

Exported synthesizers/electric pianos jumped 207% to nearly 62,600 units, but were down 8% in value to $11.3 million. Japan was the leading synthesizer customer, receiving 9,559 units (up 86% from 1988) valued at nearly $1.5 million. The United Kingdom was the leading customer for electronic pianos; shipments rose 30% in units valued at $5.7 million (a 13% decrease).

1989 Imports

Although substantial declines were reported, electronic keyboards (with one keyboard) remained the leading import category with a total dollar value of slightly more than $177 million; a 56% drop from 1988.

Imported synthesizers (keyboard type) rose 15% to nearly 189,000 units; total value dropped 14% to approximately $37 million. Hand-held electronic instruments plunged 90% in units and 148% in value.

Electric guitars were down 4% to 468,000 units valued at $32 million, a 36% decrease. Leading source was South Korea, importing approximately 230,000 units (down 14% from the previous year) valued at $17.5 million (55% of the category's $32 million).

Imported acoustic guitars dropped 23% to 556,000 units valued at $27.5 million (compared to $27.3 million in 1988). South Korea was the leading importer, shipping 51% of all units valued at under $100 per-unit and 40% of those valued at or over $100.

Acoustic pianos (the second largest import category in terms of total value) were down 31% to $115 million; units were off 37% to 56,400. Imported verticals represented 55% of total units and 31% of total value. Grand pianos were down 31% in units and 25% in value.

Imported saxophones jumped 59% in units but dropped 5% in total value. Brasswinds were up 12% in units and 16% in value; clarinets rose 50% in units and 10% in value. Units in the Other Wind Instrument category rose 26% but dropped 7% in value. Stringed instruments rose 22% in units and 3% in total value. Percussion instruments moved up 14% to $35.5 million.

1989 U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

NEW CATEGORIES IN 1989

CATEGORY	1989 Units	1989 Value	1988 Units	1988 Value	1987 Units	1987 Value	1989 Leading Sources
Piano Parts, Accessories[A] (HS 9209.914000 & 9209.918000)	N/A	$19,345,000	N/A	$25,102,000	N/A	$22,245,000	Mexico/Japan
Organ Parts, Accessories[B] (HS 9209.934000 & 9209.938000)	N/A	$9,554,000	N/A	$9,472,000	N/A	$14,394,000	Japan/ West Germany
Fretted & Bowed String Instr. Parts, Accessories[C] (HS 9209.922000, 9209.924000, 9209.926000 & 9209.928000)	N/A	$12,003,000	N/A	$17,449,000	N/A	$15,533,000	West Germany/ Taiwan
Woodwind/Brass Instr. Parts, Accessories[D] (HS 9209.994040 & 9209.994080)	N/A	$15,997,000	N/A	$14,485,000	N/A	$13,195,000	Japan
Percussion Instrs. Parts, Accessories[E] (HS 9209.991000)	N/A	$13,245,000	N/A	$10,846,000	N/A	$11,478,000	Taiwan/Japan
Electronic Instrs. Parts, Accessories[F] (HS 9209.948000 & 9209.944000)	N/A	$27,485,000	N/A	$22,967,000	N/A	$17,988,000	Japan
Other Instrs. Parts, Accessories[G] (HS 9209.998000)	N/A	$5,034,000	N/A	$3,655,000	N/A	$2,684,000	Taiwan
Other Accessories[H] (HS 9209.100000)	N/A	$2,939,000	N/A	$3,290,000	N/A	$2,278,000	S. Korea/Japan
TOTALS	N/A	$632,768,000	N/A	$836,780,000	N/A	$781,241,000	

[1]Includes: Uprights and Grands. NOTE: 1989 Units and dollars readjusted by AMC to more accurately reflect imports. [2]Unit and dollar figures for 1988, '88 and '87 readjusted by AMC to more accurately reflect imports. [3]Includes: Banjos, Ukuleles, Mandolins and Other Fretted Instruments. [4]Over $10 in value. [5]Includes: Flutes, Piccolos, Oboes, English Horns, Recorders, etc. [6]Includes: Cymbals, Drums, Marimbas, Castanets, Triangles, etc. [7]May contain misclassified instruments. [8]May contain misclassified instruments. [9]May contain misclassified instruments. [10]Statistics as reported by the U.S. Department of Commerce. May contain misclassified instruments. [11]Includes: Any instrument requiring amplification, such as Electronic Drums, Rhythm Machines, Electronic Wind Instruments, etc. NOTE: 1988 and '87 figures may have included misclassified instruments. [12]All totals in dozens. [13]Includes: Strings for Bowed String and Fretted Instruments. [A]Includes: Piano Parts and Accessories, i.e., actions, tuning pins, hammers, strings, cut case parts, etc. [B]Includes: Organ Parts and Accessories, i.e., pipes, reeds, etc. [C]Includes: Fretted and Bowed String Instrument Parts and Accessories, i.e., bridges, bows, tuning pins, etc. [D]Includes: Brass and Woodwind Instrument Parts and Accessories, i.e., mouthpieces, horn bells, key fittings, etc. [E]Includes: Percussion Instrument Parts and Accessories, i.e., mutes, pedals, dampers, etc. [F]Includes: Electronic Instrument Parts and Accessories (for keyboard, electronic drum, electronic wind, etc.) i.e., body and case parts, frets, keyboards, etc. [G]Includes: Parts and Accessories for Other Instruments such as recorders, accordions, concertinas, etc. [H]Includes: Metronomes, tuning forks and pitch pipes. Source: U.S. Department of Commerce, Bureau of Census, Foreign Trade Division.

1989 NAMM RETAILER SURVEY

During 1989, total net sales of musical instruments, sheet music and accessories rose 5.5 percent compared to 1988, as reported by music retailers around the U.S. who participated in the National Association of Music Merchants (NAMM) ongoing survey. Data is analyzed monthly by Industry Insights, Inc., of Columbus, Ohio.

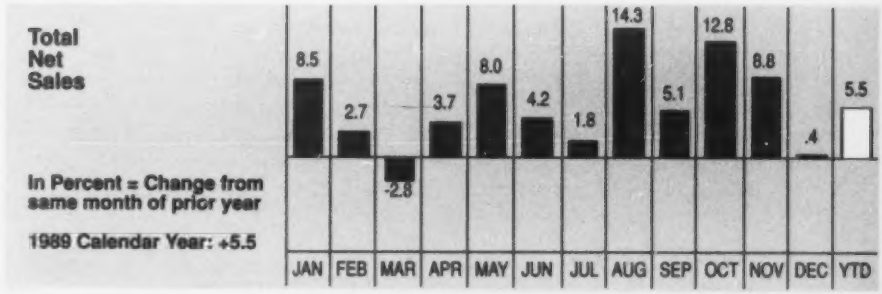
Acoustic piano sales in 1989 were down 1 percent and organs were down more than 5 percent.

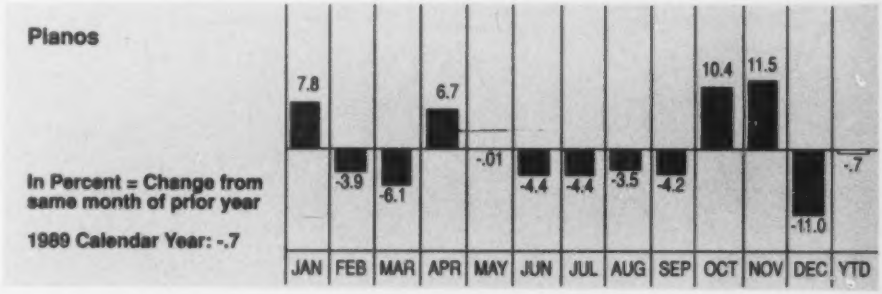
Band and orchestra instruments increased 4.8 percent and percussion instruments were up 2.6 percent.

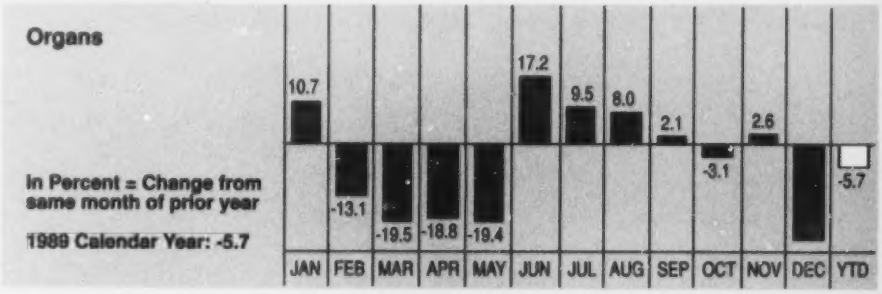
Fretted instruments posted a 6.6 percent sales increase, sound reinforcement equipment gained nearly 9 percent and electronic keyboards were down 3 percent.

Instrument amplifiers (guitar, bass and keyboard) increased nearly 6 percent and signal processing and effects devices were up nearly 5 percent.

Sheet music gained nearly 9 percent and accessories were up almost 13 percent.

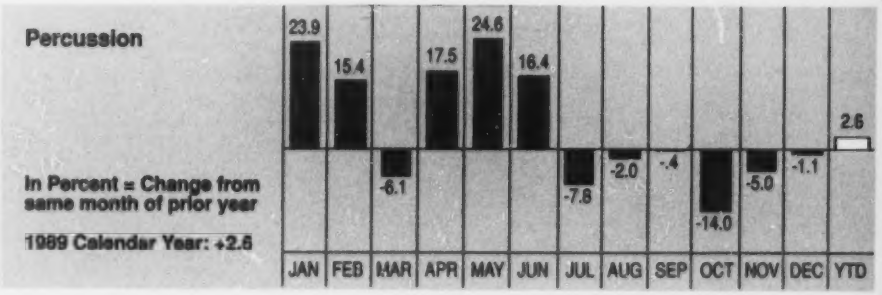


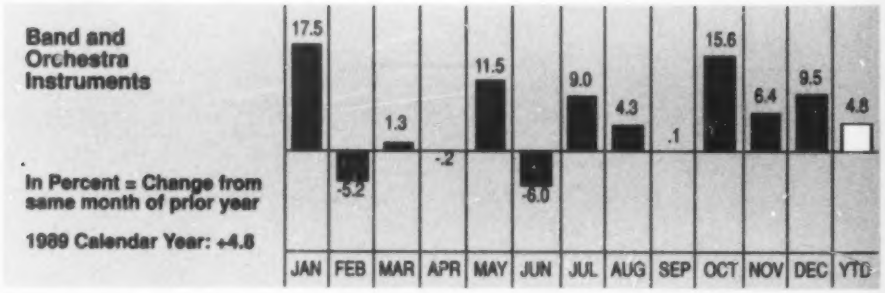


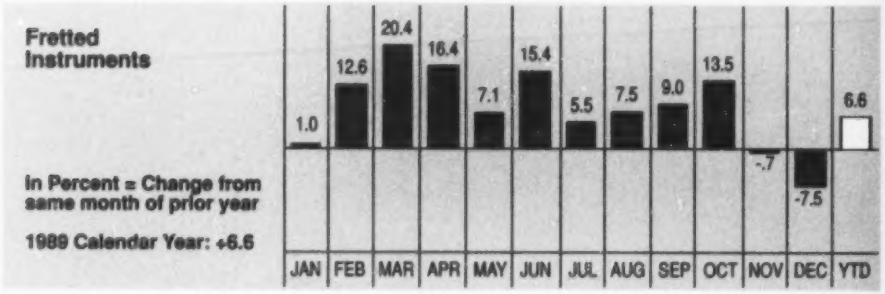


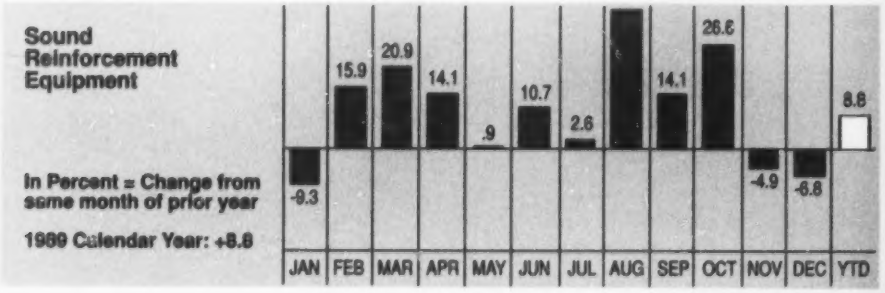
How to Read The Charts: On each of the following charts, 1989 total net sales in each product category are shown as the percentage of change from the same month of the prior year. It should be noted that dollar information has not been adjusted for inflation.

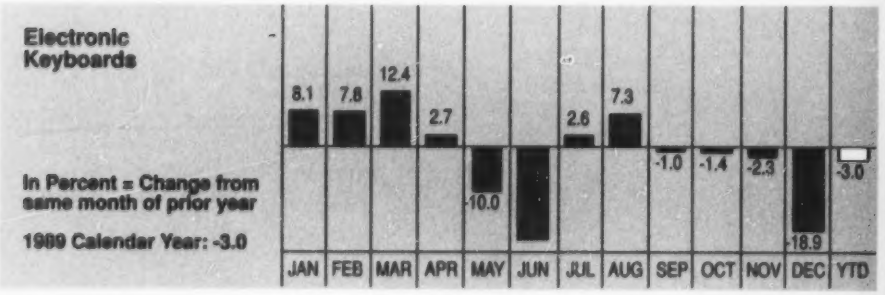
Further information about this music retailer survey is available from The National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008.



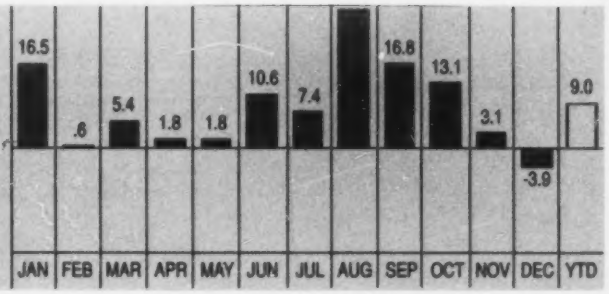

Band and Orchestra Instruments
In Percent = Change from same month of prior year
1989 Calendar Year: +4.8
17.5
-5.2
1.3
-.2
11.5
-6.0
9.0
4.3
.1
15.6
6.4
9.5
4.8
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Fretted Instruments
In Percent = Change from same month of prior year
1989 Calendar Year: +6.6
1.0
12.6
20.4
16.4
7.1
15.4
5.5
7.5
9.0
13.5
-.7
-7.5
6.6
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Sound Reinforcement Equipment
In Percent = Change from same month of prior year
1989 Calendar Year: +8.8
-9.3
15.9
20.9
14.1
.9
10.7
2.6
14.1
26.6
-4.9
-6.8
8.8
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD


Electronic Keyboards
In Percent = Change from same month of prior year
1989 Calendar Year: -3.0
8.1
7.8
12.4
2.7
-10.0
2.6
7.3
-1.0
-1.4
-2.3
-18.9
-3.0
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC YTD

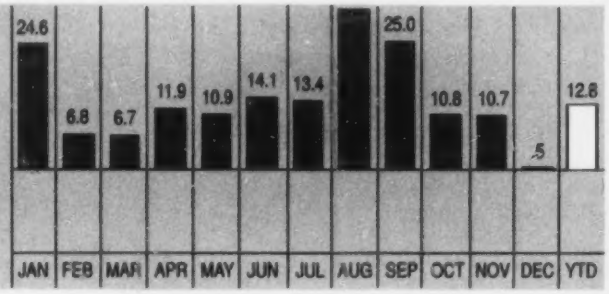
Printed Music



In Percent = Change from same month of prior year

1989 Calendar Year: +9.0

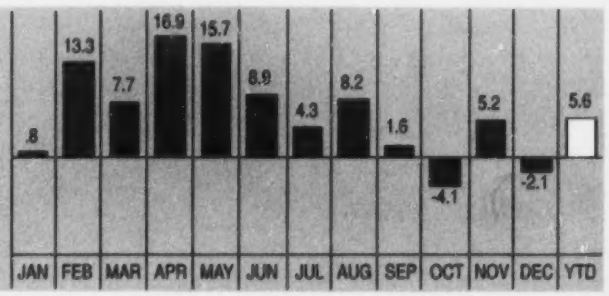
Accessories



In Percent = Change from same month of prior year

1989 Calendar Year: +12.8

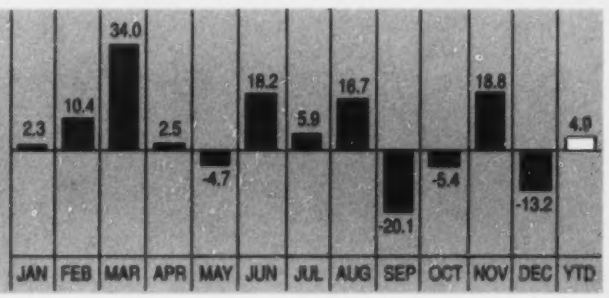
Instrument Amplifiers
(Guitar, Bass & Keyboards)



In Percent = Change from same month of prior year

1989 Calendar Year: +5.6

Signal Processing and Effects Devices



In Percent = Change from same month of prior year

1989 Calendar Year: +4.9

AMC SURVEY FINDS SELF-MOTIVATION AND STRONG PERSONAL INTEREST, TOGETHER WITH PARENTAL SUPPORT AND HOME ENVIRONMENT, IMPORTANT FACTORS IN SUSTAINING TEENAGERS' MUSIC INVOLVEMENT

Self-motivation and a strong personal interest in playing a musical instrument, supported by parental encouragement and a musical environment in the home, are important factors in sustaining music involvement by teenagers according to AMC's 1989 Teen Attitudes Survey.

These insights, and others, into the musical attitudes, backgrounds and practices of teenage musical instrument players and non-players, were revealed in the survey underwritten by the National Association of Music Merchants (NAMM).

Many variables undoubtedly influence decisions about instrumental music involvement. However, as was found in a previous AMC survey of young adults age 18 to 35, musical background and learning experience are important areas of difference among current, past and non-playing teens.

Family Involvement

Family or household members appear to strongly influence teens musical involvement. Among teens who currently play musical instruments, 63% responding to the survey report someone else in the household plays, while someone else in households of only 42% and 29% of past and non-players, respectively, plays.

Current players are much more likely to have parents (especially mothers) and siblings who play. Family or household members outside the immediate family appear to have little importance.

Another important factor distinguishing current from past teen players is the way they first became involved with music.

Fifty-two percent of current players (but only 37% of past players) first became interested in music on their own. Twenty-seven percent of current players' (compared to 20% of past players') parents got them started in instrumental music. Past players are more likely to cite a teacher or "someone else" as first getting them interested.

FAMILY MUSIC INVOLVEMENT

	Current Players	Past Players	Non-Players
Someone Else Plays (net)	**63%**	**42%**	**29%**
Mother	30	17	6
Father	11	8	8
Brother/Sister	43	22	15
Other Family/HH Member	6	8	6
No One Else Plays	**37**	**58**	**71**

WHO MADE INSTRUMENT DECISION?

	Current Players	Past Players
Decided myself	66%	56%
Made decision with someone else	29	33
Someone else decided for me	5	10

Therefore, it appears among teens that a strong personal interest in playing a musical instrument is an important aspect of sustained music involvement in addition to musical environment and parental support.

The importance of self-motivation and personal interest in music on the part of the teenager (and secondarily, parental involvement) is underlined by findings regarding instrument choice and motivation to practice. Current players' primary source of motivation to practice is internal; past players' was their parents or music teacher.

Current players also are more likely than past players to have decided on their own what instrument to play. When someone else was involved in the instrument choice, current players are more likely than past to cite parental involvement, while past players more than current players say a music teacher, friend or sibling was involved.

Who Are The Players And Non-Players?

Current Players: Demographically, current players responding to the survey tend to be female, age 12 to 13, in the eighth grade or lower and live in medium-size (four-person) households.

In addition to music-related pursuits, they tend to participate in a wide variety of other activities as well, being more likely than other teens to be currently involved in clubs or activities related to school subjects or careers and honor societies; reading for pleasure, art, photography and fitness activities; civic and social activities such as church, shopping and going to movies. Of the list of activities surveyed, current players are less likely to be involved in only one—paid employment.

Current players are most likely to play and own electronic keyboards, pianos and woodwind instruments.

THE LEARNING EXPERIENCE

	Current Players	Past Players
Original Motivation		
Became interested on my own	52%	37%
Parents got me started	27	20
Teacher got me interested	5	14
When First Learned to Play		
Before age 5	4%	4%
6–11	79	78
12–14	14	17
15–18	3	1
First Way Learned to Play		
Took band/orchestra at school	36%	34%
Private lessons	28	23
Lessons at school	19	34
Taught self	13	8
Parents/family members taught	10	7
Friend taught	2	5
Ways Ever Learned to Play		
Band/orchestra at school	64%	53%
Taught self	52	36
Private lessons	48	33
Lessons at school	36	46
Parents/family member taught	25	21
Friend taught	20	21
Primary Motivation to Practice/Play		
Self	63%	34%
Music instructor	14	33
Parents	12	23
Other players	3	4
Don't/didn't practice	10	6

Slightly more current players own keyboards, pianos and guitars than play these instruments, perhaps suggesting even among this group there has been some loss of interest in instrumental music.

Almost 90% of current players practice at least once-a-week and nearly 60% once-a-day or more.

Non-Players: Compared to current players, teens who have never learned to play a musical instrument are more likely to be male, older (age 16 or above), in grade 10 or above (especially grade 12 or above), members of either small (less than 4) or large (6 or more) households with slightly lower incomes. They are less likely to be currently involved in a number of school-related, civic and social or special interest activities, perhaps because they are more likely than others to be working after school or on weekends.

Past-Players: Teens who used to play musical instruments tend to fall between current and non-players in terms of demographics and activities. Overall, they are more likely to be female than male and tend to be older than current players. In terms of income, past players are more like current players: Their families are much more likely to have incomes of $50,000 or more than families of non-players.

The majority of past players stopped playing between age 12 and 14. Thirty percent stopped even earlier, between age six and eleven. Fourteen percent stayed with music longer, not stopping until between age 15 to 18. From this it appears the most common time for teens to stop active music participation is during the transition between junior and senior high school.

The Learning Experience

While current and past players tend not to differ in the age at which they first learned to play an instrument, they do differ in their musical training.

Asked how they first learned to play, school band or orchestra was most

often cited by both groups. However, current players were more likely than past players to have first learned via private lessons or self-instruction and less likely by lessons at school.

Current players also appear to have a greater variety of learning experiences. Asked about all the ways they had ever learned to play, current players are more likely than past to cite school band or orchestra, private lessons and self-instruction. Current players also are more likely than past players to have first learned the piano and slightly less likely to have had brass and woodwinds as their first instruments.

Attitudes Toward Music

Teens responding to AMC's survey also were asked to rate their agreement/disagreement with a number of statements probing their attitudes toward music. As expected, current players in general are more likely than past and non-players to agree with positive statements about music. However, past and non-players show surprisingly positive attitudes in some areas.

Majorities of all three groups tend to have positive feelings about music as a worthwhile pursuit, agreeing that: music is an important part of their lives; learning to play an instrument is something you'll always be glad you did; a musical career is a worthwhile pursuit, and that they probably will want their children to play musical instruments.

However, on items probing more active interest in music, all three groups, especially past and non-players, are less likely to express agreement. Only 60% of current players and less than half of past and non-players agree that "music brings the family together." The majority of past and non-players disagree that "everyone should learn to play a musical instrument," and nearly 80% of all three groups disagree that people who play musical instruments are more popular than those who don't.

INSTRUMENTS CURRENTLY PLAY / EVER LEARNED TO PLAY

	Current Players (Currently Play)	Past Players (Ever Learned)
Portable keyboard/synthesizer/ electric piano	34%	34%
Woodwind	32	36
Acoustic piano	31	25
Brass	21	26
Guitar	13	14
Percussion	13	17
Stringed instrument (not guitar)	9	13
Home organ	7	14
Other	8	29

ATTITUDES OF NON-PLAYERS (% Agree)

	Past Players	Non-Players
I wish I'd stuck with music	55%	—%
I felt better about myself when I was involved	32	—
I wish I'd learned to play an instrument	—	56
My parents were disappointed I gave up music/never played an instrument	53	16

Past and non-players show a surprising level of regret for their lack of music involvement; more than half wish they had stayed with music or learned to play an instrument. About one-third of past players agree they "felt better about themselves" when they were involved. And, the vast majority of both groups reject the idea that it's too late to learn to play. Half of past players, but only 16% of non-players, say their parents were disappointed they gave up or never played a musical instrument.

Current, past and non-players are likely to feel instrumental music should be part of schools' regular curricula as opposed to an extra-curricular activity only.

Reasons to Play or Not Play

To help identify important benefits of and barriers to instrumental music participation, the survey asked a series of questions to probe respondents' reasons for playing, no longer playing and for never playing at all. Past and non-players were also asked to identify factors that could make them want to learn or return to an instrument now.

The reasons given most frequently by current and past players for why they play/played were that playing an instrument is fun and provides a sense of personal accomplishment. Current players cited these reasons at much higher levels.

Current players' next most frequently cited reasons for playing are that it's relaxing, a good means of expression and a good hobby. These results further support findings from previous AMC reseach indicating the most compelling benefits of music are personal and internal in nature.

Past players, on the other hand, were more likely than current players to say they played because they wanted to be in a band, their parents thought it was important, their friends played and they thought it was important. Reasons most frequently cited for giving up music echo the lower levels of personal interest and internal motivation to play discussed earlier. Past players are most likely to have quit playing because they lost interest, didn't like practicing or felt playing took too much time.

Non-players, when asked to indicate reasons why they never learned to play, most frequently reported that they never wanted to, other things are more important, they just never thought about it, instruments and equipment are too expensive, their parents never encouraged them, and it takes too much time.

Involvement with Computers

Nearly half of all current players report having access to a computer at home, as do a similar proportion of past players. Among non-players, however, only 38% report having a computer at home. Regardless of whether they have home access to a computer, the vast majority of each group report having used a computer to play games and in school classes. Only a few in each group have not used a computer for either of these purposes.

While only a releatively small number of respondents have used a computer to make music, more than 80% of each group are aware of the computer's music-making capabilities. And, the majority of respondents in all three groups show at least moderate interest in learning to use a computer for this purpose. Not surprisingly, current players show the strongest interest, but substantial minorities of past and non-players are interested as well.

ATTITUDES TOWARD MUSIC-MAKING AND EDUCATION

	Current Players	Past Players	Non-Players
Music As Worthwhile Pursuit (% Agree)			
Learning to play an instrument is something you'll always be glad you did	88%	70%	58%
I'll probably want my kids to play	89	70	54
Music is a very important part of my life	84	68	63
A musical career is a worthwhile pursuit	72	65	65
Music brings the family together	59	47	42
School Music Programs			
Instrumental music should be part of regular curriculum	83%	69%	68%
Music should be extra-curricular activity only	43	49	57
I'd be/am proud to be in school band/orchestra	77	50	42
You don't get enough personal attention in school music programs	49	53	45
There's too much competition in school music programs	33	35	31

WHY PLAY (PLAYED) AN INSTRUMENT

	Current Players	Past Players
It's fun	64%	49%
Provides sense of personal accomplishment	35	24
It's relaxing	25	10
It's a good hobby	25	22
It's a good means of expression	25	10

AGE WHEN STOPPED PLAYING

	Past Players
Before Age 5	1%
Age 6–11	30
Age 12–14	56
Age 15–18	14

TEENS AND COMPUTERS

	Current Players	Past Players	Non-Players
Access to Personal Computer			
Family has computer at home	48%	45%	38%
Family doesn't have computer	52	55	62
Computer Used To/In			
Play games	93%	90%	87%
School classes (not music)	76	78	75
Word processing	56	56	45
Graphics/desktop publishing	36	34	25
Record keeping	24	23	22
Make music (not at school)	13	9	6
Music classes at school	7	5	4
None of these	2	3	5

COMPUTERS AND MUSIC-MAKING

	Current Players	Past Players	Non-Players
Computer Music-Making Capability Awareness			
Aware	87%	81%	89%
Not Aware	13	19	11
Interest in Learning to Make Music on Computer			
Extremely/very interested	40%	28%	30%
Somewhat interested	37	40	38
Not very/at all interested	23	32	33

Editor's Note: *The American Music Conference wishes to acknowledge and thank the National Association of Music Merchants (NAMM) for its generous underwriting of this attitude survey.*

The purpose of the Teenagers' Attitude Toward Music survey was to:

- *Probe the attitudes of teenagers (age 12-19) toward music and instrumental music participation.*
- *Examine differences in the backgrounds of current players, past players and non-players to identify factors that may have influenced their decisions to play or not to play.*
- *Identify relevant benefits of, and barriers to instrumental music participation among this audience.*

The study was conducted in two phases. First, using a postcard-type screener, a balanced national sample of 5,000 teenagers age 12 to 19 were separated into three groups: those who currently play a musical instrument, those who used to play but no longer do, and those who have never played an instrument. Three different survey questionnaires then were mailed to some 2,000 respondents who agreed to fill out a longer form; some 1,300 questionnaires (70 percent) were completed and returned. The results highlighted here are based on the responses of these teens.

For information about how to order a complete written report on this attitude study contact: The American Music Conference, 303 E. Wacker Dr., Suite 1214, Chicago, IL 60601 or call (312) 856-8820.

DIRECTORY OF MUSIC-RELATED ASSOCIATIONS AND ORGANIZATIONS

(Trade, Educator, Religious, Fraternal, Service, and Other)

Please Note: For easier reference, directory listings under each category are alphabetical by *key* words, i.e., piano, singing, flute, etc.

TRADE

AMERICAN FEDERATION OF MUSICIANS
1501 Broadway Suite 600
New York, NY 10036
(212) 869-1330
Represents recording, television, movie, symphony and other professional musicians.

NATIONAL ASSOCIATION OF BAND INSTRUMENT MANUFACTURERS
136 W. 21st St., 3rd Fl.
New York, NY 10011-3212
(212) 924-9175
Promotes, encourages and fosters education and participation in band and orchestra instruments.

NATIONAL ASSOCIATION OF PROFESSIONAL BAND INSTRUMENT REPAIR TECHNICIANS
8 Ardith Dr.
Normal, IL 61761
(309) 453-4257
Provides forum for exchange of ideas and implements code of professional ethics.

RETAIL SHEET MUSIC DEALERS ASSOCIATION
4020 McEwen, Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Promotes sheet music dealer/publisher relations; encourages music education, and provides common ground for exchange of ideas.

NATIONAL ASSOCIATION OF SCHOOL MUSIC DEALERS
317 E. Walnut
Springfield, MO 65806
Services the musical needs of schools at all levels.

MUSIC ACHIEVEMENT COUNCIL
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
A joint council of the National Association of Music Merchants and National Association of Band Instrument Manufacturers dedicated to the retention of students in school band and orchestra programs.

MUSIC DISTRIBUTORS ASSOCIATION
136 W. 21st St.
New York, NY 10011-3212
(212) 924-9175
Association for musical instrument and accessory wholesalers, importers, or manufacturers.

INTERNATIONAL ASSOCIATION OF ELECTRONIC KEYBOARD MANUFACTURERS
136 W. 21st St., 3rd Fl.
New York, NY 10011-3212
(212) 924-9175
Association for electronic keyboard manufacturers.

CREATIVE AUDIO AND MUSIC ELECTRONICS ORGANIZATION
Route 2, Box 408
Meridian, MS 39305
(601) 485-7218
Represents professional audio and music electronics manufacturers and distributors.

GUITAR & ACCESSORIES MUSIC MARKETING ASSOCIATION
136 W. 21st St.
New York, NY 10011-3212
(212) 924-9175
Association for fretted instrument and/or related accessory manufacturers, distributors and others.

NATIONAL ASSOCIATION OF MUSIC IMPORTERS & EXPORTERS
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory importers and exporters; publishes import/export statistics, trade show and tariff schedules, and newsletters reporting worldwide government activities affecting international trade.

GUILD OF AMERICAN LUTHIERS
8222 S. Park Ave.
Tacoma, WA 98408
(206) 472-7853
Information exchange network for stringed instrument builders and repairers. Publishers of *American Lutherie;* instrument blueprints and biennial conventions.

NATIONAL ASSOCIATION OF MUSIC MERCHANTS
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001, (800) 767-6266
Represents retailers, manufacturers and distributors of musical instruments, professional audio equipment and related music accessories. Also provides variety of educational, market development and support services, including management of two annual trade exhibitions.

INTERNATIONAL MIDI ASSOCIATION
5316 W. 57th St.
Los Angeles, CA 90056
(213) 649-6434
International MIDI (Musical Instrument Digital Interface) information network and official distributor of the MIDI 1.0 Detailed Specification.

INTERNATIONAL ASSOCIATION OF PIANO BUILDERS & TECHNICIANS
4510 Belleview, Suite 100
Kansas City, MO 64111
(816) 753-7747
International association for piano technicians.

PIANO MANUFACTURERS ASSOCIATION INTERNATIONAL
4020 McEwen
Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Association representing the acoustic piano industry.

PIANO TECHNICIANS GUILD, INC.
4510 Belleview, Suite 100
Kansas City, MO 64111
(816) 753-7747
Association for technicians specializing in tuning, maintenance, repair and rebuilding of fine pianos. Provides examinations for Registered-Tuner-Technician (RTT).

NATIONAL MUSIC PUBLISHERS ASSOCIATION
205 E. 42nd St.
New York, NY 10017
(212) 370-5330
Association representing the music publishing industry.

EDUCATOR/SCHOOLS

ASSOCIATION OF PERFORMING ARTS PRESENTERS
1112 16th St., NW (#620)
Washington, DC 20036
(202) 833-2787
Professional association/service organization for performing arts presenting organizations.

COLLEGE BAND DIRECTORS NATIONAL ASSOCIATION
Box 8028
University of Texas
Austin, TX 78713
(512) 471-5883
Supports and promotes growth of member musicians, educators, conductors and administrators.

AMERICAN SCHOOL BAND DIRECTORS ASSOCIATION
P.O. Box 146
Otsego, MI 49078
(616) 694-2092
Promotes the advancement and improvement of elementary and secondary school instrumental music instruction.

AMERICAN COLLEGE OF MUSICIANS
808 Rio Grande
Austin, TX 78767
(512) 478-5775
Promotes music education with established standardized curriculum for piano teachers and students.

COLLEGE MUSIC SOCIETY
P.O. Box 18000
Boulder, CO 80308-8000
(303) 449-1611
Organization for college music teachers which gathers and disseminates information and ideas on music in higher education.

NATIONAL ASSOCIATION OF COLLEGE WIND & PERCUSSION INSTRUCTORS
Division of Fine Arts
Northeast Missouri State University
Kirksville, MO 63501
Provides communications forum for college, university and conservatory wind and percussion teachers.

MUSIC EDUCATORS NATIONAL CONFERENCE
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Educational association dedicated to advancement of all aspects of music education in the schools from pre-kindergarten through graduate studies. Membership includes teachers, administrators, music supervisors.

MUSIC INDUSTRY CONFERENCE
% MENC
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Auxiliary organization of the Music Educators National Conference which serves the mutual interests of the industry and educators through exchange of ideas, development of code of ethics, and maintenance of the highest level of business procedures at conventions and in advertising and all relations with the public.

ORGANIZATION OF AMERICAN KODALY EDUCATORS
Music Department, Nicholls State University
Box 2017
Thibodaux, LA 70310
(504) 448-4602
Organization for public and private teachers, students, administrators and others who support the Kodaly teaching method.

NATIONAL GUILD OF COMMUNITY MUSIC SCHOOLS
40 N. Van Brunt St., Suite 32
Englewood, NJ 07631
(201) 871-3337
Association of nonprofit, nondegree community schools of the arts that offer instruction to people of all ages and ability.

NATIONAL SCHOOL ORCHESTRA ASSOCIATION
345 Maxwell Dr.
Pittsburgh, PA 15236
(412) 882-6696
Supports elementary, junior and senior high school and university instrumental music teachers dedicated to development of school orchestra programs.

COUNCIL FOR RESEARCH IN MUSIC EDUCATION
1205 W. California
Urbana, IL 61801
(217) 333-1027
Organization for scholars and institutions interested in advancing the cause of research in music teaching and learning.

NATIONAL ASSOCIATION OF SCHOOLS OF MUSIC
11250 Roger Bacon Dr., Suite 21
Reston, VA 22090
(703) 437-0700
Provides accreditation, statistical services, policy analysis and administrative development for programs preparing professional musicians, teachers and music services personnel.

NATIONAL COUNCIL OF STATE SUPERVISORS OF MUSIC
%Linda Mercer
Ohio Department of Education
65 Front St.
Columbus, OH 43215
(614) 466-2407
Advisory body to the National Association of Music Educators' National Executive Board with membership open to anyone responsible for music in a state or territory department of education and a member of MENC. Goal is to develop and strengthen music education in the U.S. and its territories.

AMERICAN STRING TEACHERS ASSOCIATION
UGA Station Box 2066
Athens, GA 30612-0066
(404) 542-2741
Promotes and encourages professional and amateur string (including guitar and harp) and orchestra study, performance, teacher education, research and pedagogy.

SUZUKI ASSOCIATION OF THE AMERICAS
P.O. Box 354
Muscatine, IA 52761-0354
(319) 263-3071
Organization of teachers, parents and educators interested in and dedicated to advancement of the Suzuki Method in the western hemisphere.

MUSIC TEACHERS NATIONAL ASSOCIATION
617 Vine St., Suite 1432
Cincinnati, OH 45202-2434
(513) 421-1420
Organization serving music teachers in studios, conservatories, music schools, public and private schools and institutions of higher learning.

WOMEN BAND DIRECTORS NATIONAL ASSOCIATION
344 Overlook Dr.
West Lafayette, IN 47906
(317) 463-1738
Provides encouragement for young women entering the instrumental music field and develops comprehensive music and education programs beneficial to women band directors and their students.

RELIGIOUS

NATIONAL CATHOLIC BANDMASTERS ASSOCIATION
Box 1023
Notre Dame, IN 46556
(219) 239-7136
Organization representing Catholic school instrumental music teachers which promotes qualitative and quantitative growth of Catholic school band programs.

CHRISTIAN INSTRUMENTAL DIRECTORS ASSOCIATION
P.O. Box 601
Cedarville, OH 45314
Designed to meet the needs of private, church-related school band and/or orchestra directors and church music directors interested in using instruments in worship.

STANDING COMMISSION ON CHURCH MUSIC OF THE EPISCOPAL CHURCH
815 Second Ave.
New York, NY 10017
(212) 867-8400
Undertakes research and development of musical resources (e.g. hymnals), guidelines and educational materials for Episcopal liturgical music.

PRESBYTERIAN ASSOCIATION OF MUSICIANS
1000 E. Morehead St.
Charlotte, NC 28204
(No Telephone)
Association which cooperates with Presbyterian Church (USA) agencies and offers assistance in worship, music and the arts.

UNITARIAN UNIVERSALIST MUSICIANS' NETWORK
4190 Front St.
San Diego, CA 92103
(619) 231-0795
Association of professional church musicians and supporters united to enhance the quality of U.U. music and musicians.

FRATERNAL

PHI BETA MU INTERNATIONAL BANDMASTERS FRATERNITY
1111 Belaya St.
Houston, TX 77090
(713) 586-1111
Honors outstanding band directors and provides clinic services for instrumental music.

PI KAPPA LAMBDA
School of Music
Northwestern University
Evanston, IL 60208
(312) 491-5737
Recognizes and encourages highest level of musical achievement and academic scholarship.

RESEARCH AND PROMOTION

ACCORDION FEDERATION OF NORTH AMERICA, INC.
11438 Elmcrest St.
El Monte, CA 91732
(213) 686-1769
Music school operators and teachers dedicated to advancing the accordion in all areas.

AMERICAN ACCORDION MUSICOLOGICAL SOCIETY
334 S. Broadway
Pitman, NJ 08071
(609) 589-8308
Research and library facility (for composers, performers, music educators) of information relating to all aspects of the accordion as a serious concert instrument.

NATIONAL BAND ASSOCIATION
℅ Edward S. Lisk
Oswego High School
Oswego, NY 13126
(315) 341-5891
Dedicated to promoting bands and the achievement of excellence in bands and band music.

INTERNATIONAL SOCIETY OF BASSISTS
School of Music
Northwestern University
Evanston, IL 60208
(708) 491-4764
Stimulates public interest, improves performance standards and provides an organization for musicians specializing in double bass instruction, study, performance, manufacture, repair and research.

INTERNATIONAL BLUEGRASS MUSIC ASSOCIATION
326 St. Elizabeth St.
Owensboro, KY 42301
(502) 684-9025
Promotes the bluegrass music industry; maintains databases of bluegrass-related radio, press, organizations, and performing venues; and publishes bimonthly newsletter.

CATGUT ACOUSTICAL SOCIETY
112 Essex Ave.
Montclair, NJ 07042
(201) 744-4029
An international organization devoted to research in the theory, design, construction and history of stringed instruments and to related areas of acoustical study.

AMERICAN MUSIC CENTER
30 W. 26th St., Suite 1001
New York, NY 10010
(212) 366-5260
Promotes the recognition and performance of contemporary American music.

CHINESE MUSIC SOCIETY OF NORTH AMERICA
One Heritage Plaza, Suite 335
Woodridge, IL 60517
(708) 910-1551
Devoted to promotion and research of Chinese music by providing public concerts, recitals, lectures, exhibitions, recordings.

AMERICAN CHORAL FOUNDATION
administered by Chorus America
2111 Sansom Street
Philadelphia, PA 19103
(215) 563-2430
Promotes research into performances of established choral works and discovery of unpublished, unknown choral works. Publisher of *The American Choral Review* and *Research Memorandum Series*.

INTERNATIONAL FEDERATION FOR CHORAL MUSIC
College of Music CB301
University of Colorado
Boulder, CO 80309-0301
(303) 492-8314
Association of choral organizations and individuals dedicated to fostering choral music and activities throughout the world.

NATIONAL ASSOCIATION OF COMPOSERS/USA
P.O. Box 49652, Barrington Station
Los Angeles, CA 90049
(213) 541-8213
Dedicated to improving the social and political status of American composers, the preservation of music and dissemination of American composition information and news.

NATIONAL TRADITIONAL COUNTRY MUSIC ASSOCIATION
106 Navajo
Council Bluffs, IA 51501
Works to restore acoustic country, bluegrass, folk, hillbilly, mountain, western, ragtime and honkytonk music to the international stage.

EAR, INC.
131 Varick St. (#905)
New York, NY 10013
(212) 807-7944
Promotes public appreciation of new, innovative music and sound arts primarily through publishing *Ear Magazine of New Music* and serving as a resource for referrals, training in music journalism, and magazine production and management.

SOCIETY FOR ETHNOMUSICOLOGY
Morrison Hall 005
Indiana University
Bloomington, IN 47405-2051
(812) 855-6672
Advances the research, study and performance of music in all historical periods and cultural contexts.

NATIONAL FLUTE ASSOCIATION
℅ Myrna Brown
805 Laguna
Denton, TX 76201
(817) 387-6626
Promotes high standards of excellence in flute performance and teaching; exchange of ideas and information, and the composition, publication and distribution of flute music.

GOSPEL MUSIC ASSOCIATION
P.O. Box 23201
Nashville, TN 37202
(615) 242-0303
Builds public awareness for gospel music and serves as information clearinghouse.

INTERNATIONAL STEEL GUITAR CONVENTION
9535 Midland Blvd.
St. Louis, MO 63114
(314) 427-7794
Promotes steel guitar players and industry.

AMERICAN HARP SOCIETY
6331 Quebec Dr.
Los Angeles, CA 90068-2831
(213) 463-0716
Promotes appreciation of the harp, improvement of performance quality and encourages harp music composition.

INTERNATIONAL SOCIETY OF FOLK HARPERS AND CRAFTSMEN, INC.
4718 Maychelle Dr.
Anaheim, CA 92807-3040
(714) 998-5717
Promotes playing, construction and education of folk and ethnic nonpedal harps.

INTERNATIONAL HORN SOCIETY
2220 N. 1400 E
Provo, UT 84604
(801) 377-3026
Establishes contact among horn players, worldwide, for the exchange and publication of ideas and research into all fields pertaining to the horn.

AMERICAN MUSICAL INSTRUMENT SOCIETY
℅ The Shrine to Music Museum
414 E. Clark
Vermillion, SD 57069
(605) 677-5306
Dedicated to promoting the study of the history, design and use of musical instruments in all cultures and from all historical periods.

INTER-AMERICAN MUSIC COUNCIL
℅ Prof. Efrain Paesky
Secretary General
1889 F Street, NW, 230-C
Washington, DC 20006
(202) 458-3158
Advisory entity of the Organization of American States for the centralization of inter-American activities in the music field. Promotes the development, interchange and diffusion of musical works, performers, composers and the general activities and information in all fields of music.

INTERNATIONAL COUNCIL FOR TRADITIONAL MUSIC
Department of Music
Columbia University
New York, NY 10027
(212) 678-0332
Furthers the study, practice, documentation, preservation and dissemination of traditional music and dance (folk, popular, classical, urban) of all countries.

JAZZ INTERACTIONS
P.O. Box 268
Glen Oaks, NY 11004
(718) 465-7500
Promotes interest and understanding of jazz; maintains 24-hour jazz hotline and printed listing of clubs and artists in New York and vicinity; produces free summer jazz concerts in parks.

NATIONAL JAZZ SERVICE ORGANIZATION
P.O. Box 50152
Washington, DC 20004-0152
(202) 347-2604
Promotes growth and enhancement of jazz as an American art form by providing information, consultation and technical assistance to individuals, educational institutions and organizations committed to the creation, performance, instruction, presentation and preservation of jazz.

THE MAPLE LEAF CLUB
105 Ricky Ct.
Grass Valley, CA 95949
Devoted to preservation of past and present classic ragtime music.

AMERICAN MUSICOLOGICAL SOCIETY
201 S. 34th St.
Philadelphia, PA 19104-6313
(215) 898-8698
Dedicated to advancing research in the various fields of music as a branch of learning and scholarship.

NATIONAL OPERA ASSOCIATION
Rt. 2, Box 196
Commerce, TX 75428
(214) 886-3830
Promotes greater appreciation, more performances and increased composition of opera; supports special projects which improve scope and quality of opera, and provides opportunities for operatic talent.

AMERICAN ORFF-SCHULWERK ASSOCIATION
P.O. Box 391089
Cleveland, OH 44139-1089
(216) 543-5366
Serves as central promotion agency for the Schulwerk of Carl Orff and Gunild Keetman by assisting in development of teacher training programs, encouraging research and documentation pertaining to all aspects of Schulwerk and disseminating information.

ORGAN HISTORICAL SOCIETY
P.O. Box 26811
Richmond, VA 23261
(804) 353-9226
Promotes widespread musical and historical interest in American organ-building through collection, preservation, publication of historical information, recordings and public concerts.

AMERICAN THEATRE ORGAN SOCIETY
P.O. 417490
Sacramento, CA 95841
(916) 962-1019
Dedicated to preservation of the theatre pipe organ.

NATIONAL PIANO FOUNDATION
4020 McEwen, Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Provides publications, videos, newsletter, membership and other educational activities expressing the benefits of playing and owning a piano.

POLISH SINGERS ALLIANCE OF AMERICA
7 Norwood Ct.
Staten Island, NY 10304
(718) 720-6089
Dedicated to preservation and promotion of Polish and American song.

INTERNATIONAL POLKA ASSOCIATION
4145 S. Kedzie Ave.
Chicago, IL 60632
(312) 254-7771
Encourages pursuit of polka music study, dancing and traditional folklore and promotes, maintains, and advances public interest in polka entertainment.

AMERICAN RECORDER SOCIETY
596 Broadway, #902
New York, NY 10012-3234
(212) 966-1246
Service organization for professional and avocational recorder players.

RHYTHM AND BLUES ROCK AND ROLL SOCIETY, INC.
P.O. Box 1949
New Haven, CT 06510
(203) 735-2736
Educates general public about creators and developers of rock 'n roll music.

SONNECK SOCIETY
P.O. Box 476
Canton, MA 02021
Encourages research, performance, recording, publication and dissemination of information regarding all aspects of American music and music in America.

LEOPOLD STOKOWSKI SOCIETY OF AMERICA
870 N. Meadows Ct., #E
Columbus, OH 43229
(614) 846-8659
Promotes the legacy of Stokowski through production of cassette and LP recordings and semi-annual magazine.

AMERICAN SYMPHONY ORCHESTRA LEAGUE
777 Fourteenth St., NW, Suite 500
Washington, DC 20005
(202) 628-0099
Service organization dedicated to the promotion of symphony orchestras in the U.S.

NATIONAL ASSOCIATION FOR MUSIC THERAPY
505 11th St., SE
Washington, DC 20003
(202) 543-6864
Promotes therapeutic use of music in hospital, educational and community settings, and the advancement of education, training, and research in the profession.

INTERNATIONAL TRUMPET GUILD
School of Music
Western Michigan University
Kalamazoo, MI 49008
(616) 387-4700
Promotes communication among trumpet players, worldwide, and improves the artistic level of performance, teaching and literature associated with the trumpet.

AMERICAN VIOLA SOCIETY
Department of Music
Brigham Young University
Provo, UT 84604
Promotes viola research and performance and holds annual congresses alternately in the U.S. and Europe.

VIOLIN MAKERS ASSOCIATION OF ARIZONA, INTERNATIONAL
4748 N. Fontana
Tucson, AZ 85704
(602) 888-7911
Furthers the art of making bowed stringed instruments.

CHORUS AMERICA
ASSOCIATION OF PROFESSIONAL VOCAL ENSEMBLES
2111 Sansom St.
Philadelphia, PA 19103
(215) 563-2430
Promotes the professional growth and quality of the choral art, occupational respectability and opportunity for its performers and by their performance, enrichment for all segments of American society.

OTHER

NATIONAL BAND AND CHORAL DIRECTORS HALL OF FAME
519 N. Halifax Ave.
Daytona Beach, FL 32118
(904) 252-0381
Recognizes and honors outstanding school bands, choral groups and directors.

NORTH AMERICAN BAND DIRECTORS COORDINATING COMMITTEE
1225 Candlewood Hill
Northbrook, IL 60062
(708) 272-4728
Holds annual symposium for band and related association representatives.

AMERICAN BANDMASTERS ASSOCIATION
110 Wyanoke Dr.
San Antonio, TX 78209
(512) 829-5555
Recognizes outstanding achievement in the concert band field and its music.

SOCIETY FOR THE PRESERVATION AND ENCOURAGEMENT OF BARBER SHOP QUARTET SINGING IN AMERICA, INC.
6315 Third Ave.
Kenosha, WI 53140-5199
World's largest all-male singing organization and publisher/distributor of authentic barbershop arrangements.

AMERICAN BOYCHOIR FEDERATION
Shallway Building
Connellsville, PA 15425
(412) 628-3939
Professional association of 1,400 boychoirs sponsored by service organizations, schools, churches or independent corporations for the exchange of information, techniques, organizational charts and tour information.

BROADCAST MUSIC, INC.
320 W. 57th St.
New York, NY 10019
(212) 586-2000
Acquires performing rights and grants licenses for public performance.

CHORISTERS GUILD
2834 W. Kingsley Rd.
Garland, TX 75041
(214) 271-1521
Non-denominational religious and educational organization specializing in music and choir method aids for children and youth choirs.

MEET THE COMPOSER
2112 Broadway, Suite 505
New York, NY 10023
(212) 787-3601
Awards grants to nonprofit organizations which invite composers to actively participate in programs featuring their music.

NATIONAL MUSIC COUNCIL
40 W. 37th Street (5th Floor)
New York, NY 10018
(212) 563-3734
Provides forum for discussion of America's national music affairs; acts as clearinghouse for the joint opinion and decision of members, works to strengthen importance of music in Americans' lives and culture.

DETROIT JAZZ CENTER
2626 Webb
Detroit, MI 48206
(313) 867-4141
Developing Detroit area's first multi-focused jazz institution with continuing programs in performance, jazz orchestra development, studies, archives, documentation, and mass communications.

SOCIETY FOR ELECTRO-ACOUSTIC MUSIC IN THE U.S.
P.O. Box 3977
Beverly Hills, CA 90212
(213) 388-0476
Promotes research and performance of electro-acoustic music in the U.S.

ELECTRONIC MUSIC CONSORTIUM
% Thomas Wells
School of Music, Ohio State University
Columbus, OH 43210
(614) 292-7837
Electronic studios represented by music educators; assists in the establishment and maintenance of studio excellence.

HARMONY, INC.
8502 S. Reese Rd.
Birch Run, MI 48415
(517) 781-2610
Organization for women of all ages who enjoy singing and performing four-part barbershop harmony.

ASSOCIATION FOR TECHNOLOGY IN MUSIC INSTRUCTION
% Ann Blombach
School of Music
Ohio State University
Columbus, OH 43210
(614) 292-2138
Dedicated to increasing public awareness of the need for computer-based music instruction.

PRODUCTION MUSIC LIBRARY ASSOCIATION
40 E. 49th St., 9th Floor
New York, NY 10017
(212) 832-1098
Association for leading U.S. music libraries which assists music users in obtaining the right music for productions along with a proper license, and protects music publishers' and composers' copyrights.

OPERA AMERICA
777 14th St., NW
Washington, DC 20005
(202) 347-9262
Provides professional opera companies in the United States and Canada with a forum for exchange of ideas and solving of common problems through seminars, annual conferences, surveys and publications.

NATIONAL ORCHESTRAL ASSOCIATION
475 Riverside Dr., Suite 249
New York, NY 10115
(212) 870-2009
The NOA's current program entitled the New Music Orchestral Project entails the creation of a unique orchestra solely devoted to the reading, taping, study and performance of new American orchestral music.

NATIONAL SYMPHONY ORCHESTRA ASSOCIATION
JFK Center for the Performing Arts
Washington, DC 20566
(202) 785-8100
Presents 52-week season of concerts (classical, subscription series, pops) and an extensive educational program. Offers programs for talented high school musicians, study programs to encourage minority musicians, etc.

ORGAN CLEARING HOUSE
P.O. Box 104
Harrisville, NH 03450-0104
(603) 827-3055
Lists more than 200 pipe organs available for relocation. Also offers consultation, recommendations for restoration, rebuilding, or replacement of old pipe organs.

BOSTON ORGAN CLUB
P.O. Box 104
Harrisville, NH 03450-0104
(603) 827-3055
Documents history of American organ-building and preservation of fine examples of the art.

PARENTS' MUSIC RESOURCE CENTER
1500 Arlington Blvd.
Arlington, VA 22209
(703) 527-9466
Addresses the issue of lyrics in some popular music; strives to increase awareness through education and promotes responsibility and self-restraint within the recording industry.

AMATEUR CHAMBER MUSIC PLAYERS, INC.
545 Eighth Ave., 9th Floor
New York, NY 10018
(212) 244-2778
Publishes directories which serve as networking sources for amateur instrumetal and vocal musicians worldwide.

REMEMBER THAT SONG NEWSLETTER
5821 N. 67th Ave., Suite 103-306
Glendale, AZ 85301
(602) 435-2136
Vintage sheet music collectors' organization.

AMERICAN MUSIC SCHOLARSHIP ASSOCIATION
1826 Carew Tower
Cincinnati, OH 45202
(513) 421-5342
Identifies, develops and exposes young pianists (ages 5 through 30) to formative influences of great musicians' performances. Also provides standards for teaching technical mastery and artistic excellence and generates greater music appreciation among audiences through exposure to talented artists.

NATIONAL ACADEMY OF SONGWRITERS
6381 Hollywood Blvd., Suite 780
Hollywood, CA 90028
(213) 463-7178
Offers song registration and group legal U.S. copyright registration services, hotline, song critique, seminars, publishers' workshops, songwriters' network and newsletter and songwriting, business and theory courses.

NATIONAL INSTITUTE FOR MUSIC THEATRE
% Kennedy Center
Washington, DC 20566
(202) 965-2800
Provides grants to American composers, librettists, lyricists and singers to help further their careers in music theatre (opera, musical comedy, experimental forms) and supports innovative projects to develop the music theatre art form.

YOUNG CONCERT ARTISTS, INC.
250 W. 57th St., Suite 921
New York, NY 10019
(212) 307-6655
Dedicated to discovering and developing careers of exceptionally gifted musicians.

YOUNG MUSICIANS FOUNDATION
554 S. San Vincente Blvd.
Los Angeles, CA 90048
(213) 651-0545
Provides financial support and performance opportunities to talented young musicians pursuing classical music careers.

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Manufacturer and wholesale distributor of acoustic and electric guitars and musical accessories.

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ACE MUSIC
13630 W. Dixie Hwy.
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P.O. Box 298
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Band instrument rebuilding; repair school; parts, tool & case supplier

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808 Rio Grande, Box 1807
Austin, TX 78767
(512) 478-5775
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